

OrgChartHosting

TUTORIAL 3 – CREATE A CHART MANUALLY

OrgChart Now Tutorials

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TUTORIAL 3

OVERVIEW

In this tutorial we will be going through the steps of creating your own chart from scratch, as well as file management.

This training is for both Administrators and End Users.

This tutorial will cover -

- Blank chart creation
- Box creation
- Box editing
- Applying pre-existing views
- Manually formatting your chart
- Box sorting

These tutorials are part of a series of tutorials designed to provide you with a better understanding of the OrgChart Now solution.

OrgChart Workbench is one of the standard modules available in OrgChart Now.

The OrgChart Viewer displays the current master chart. The master chart is a read only chart that is automatically synchronized with your source HR data.

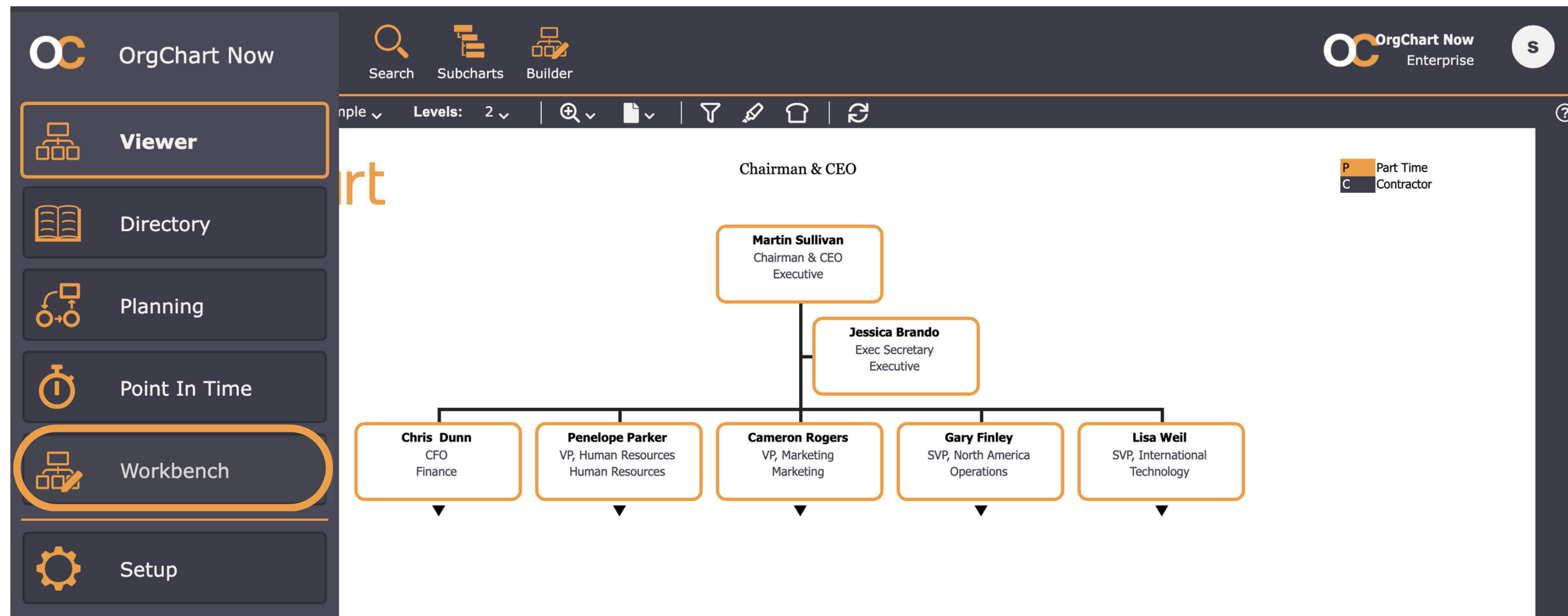
The Chart Builder allows you to take a snapshot of any subset of your master chart.

This snapshot is the starting point for a workforce plan.

The Workbench allows Administrators and Read/Write users to create and modify customized chart exports using their Master Chart data.

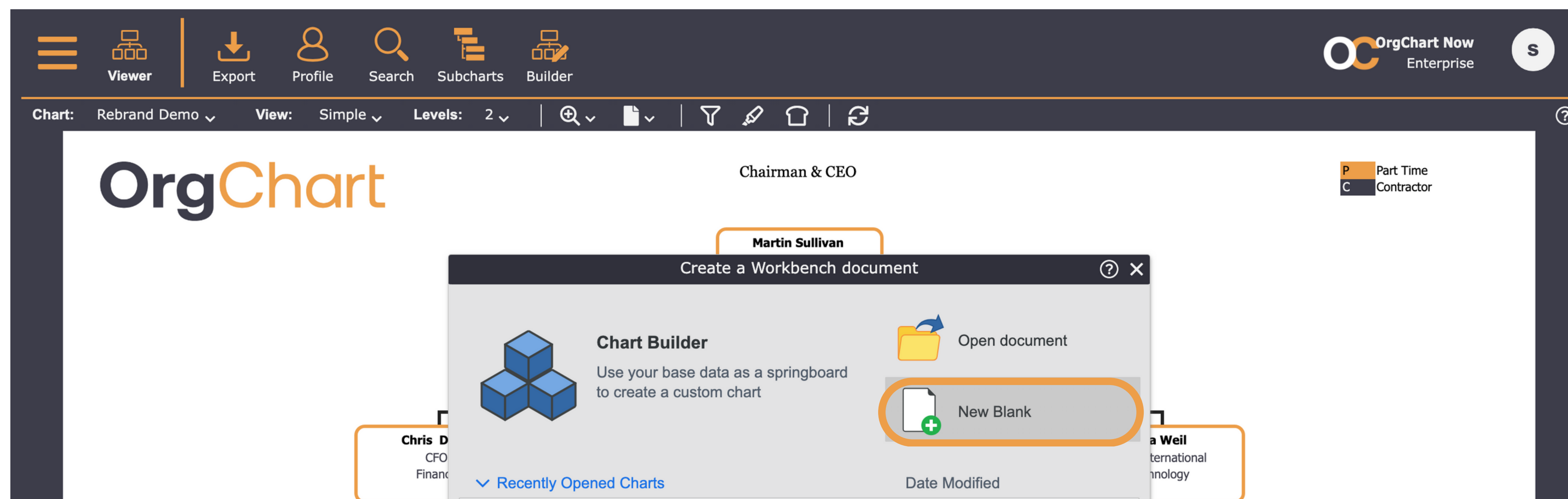
ORGCHART WORKBENCH - CREATING THE CHART

Before we begin, we will need to navigate from the OrgChart Viewer to the OrgChart Workbench.



1 Click on the  menu icon and select Workbench.

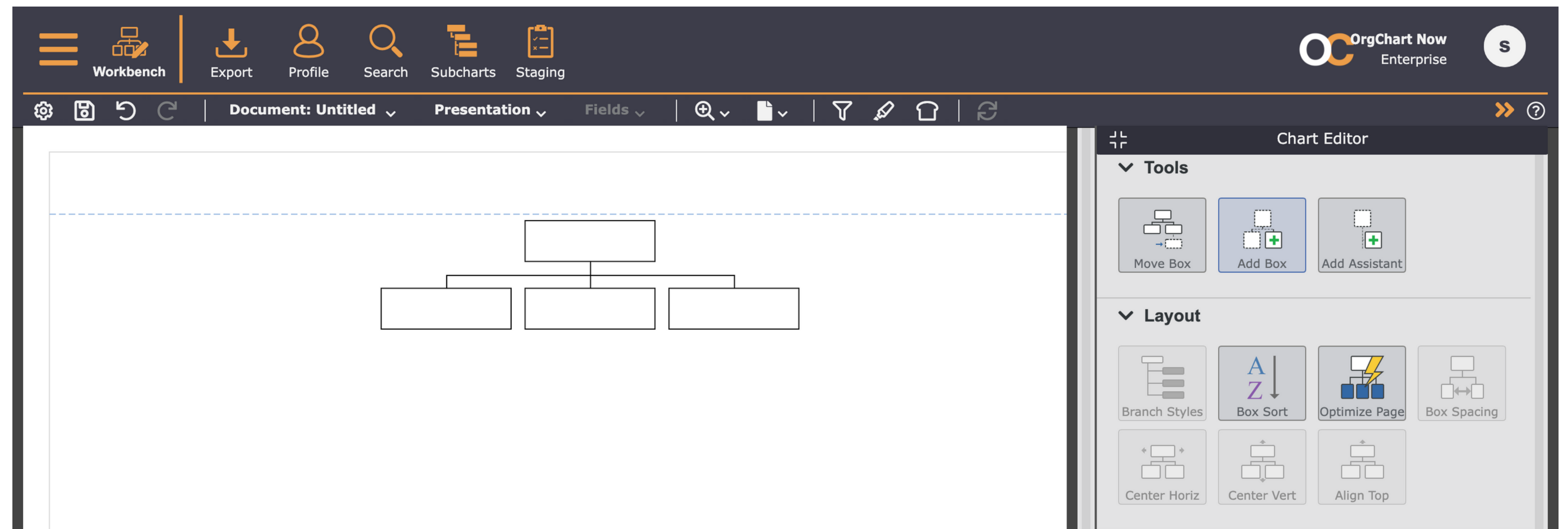
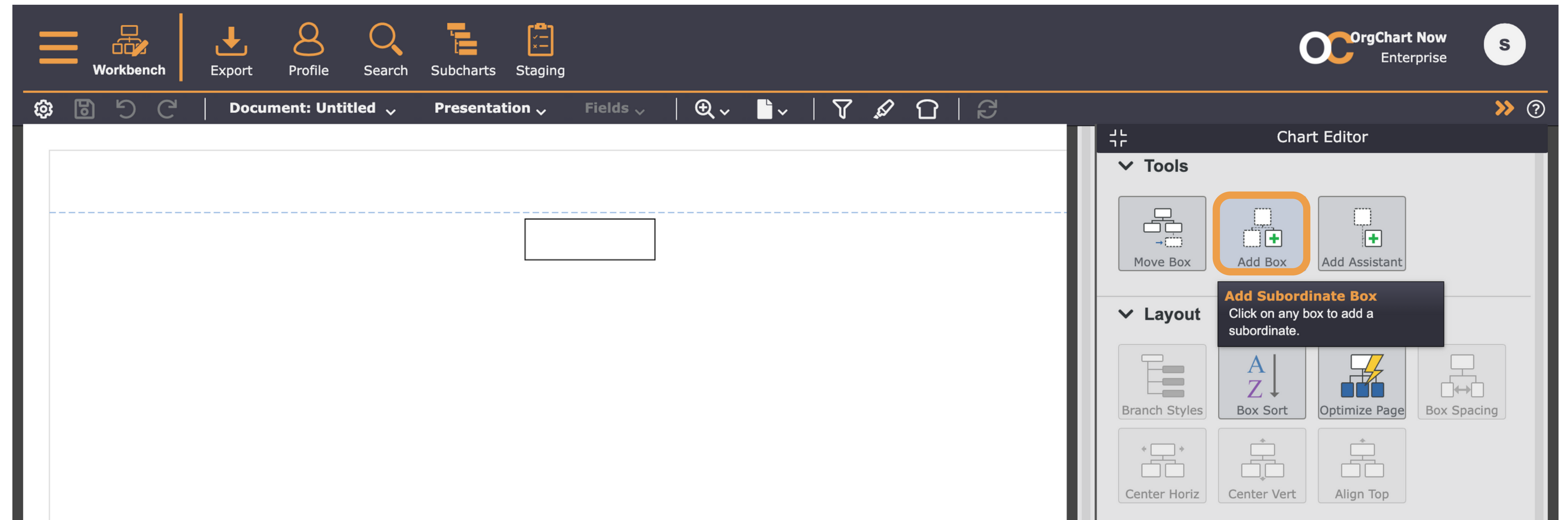
2 Click on the New Blank button in the Chart Builder pop-up panel.



ORGCHART WORKBENCH – ADDING BOXES

1

Click on the Add Box icon and click on the blank box on the top of the chart to add additional boxes.



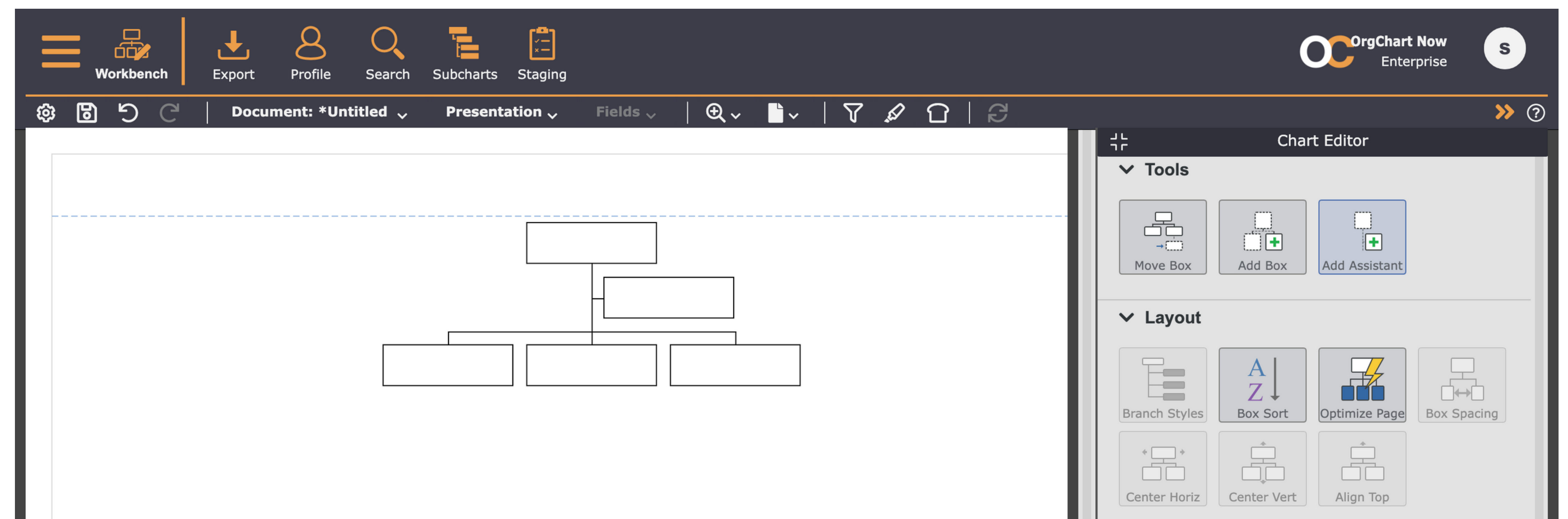
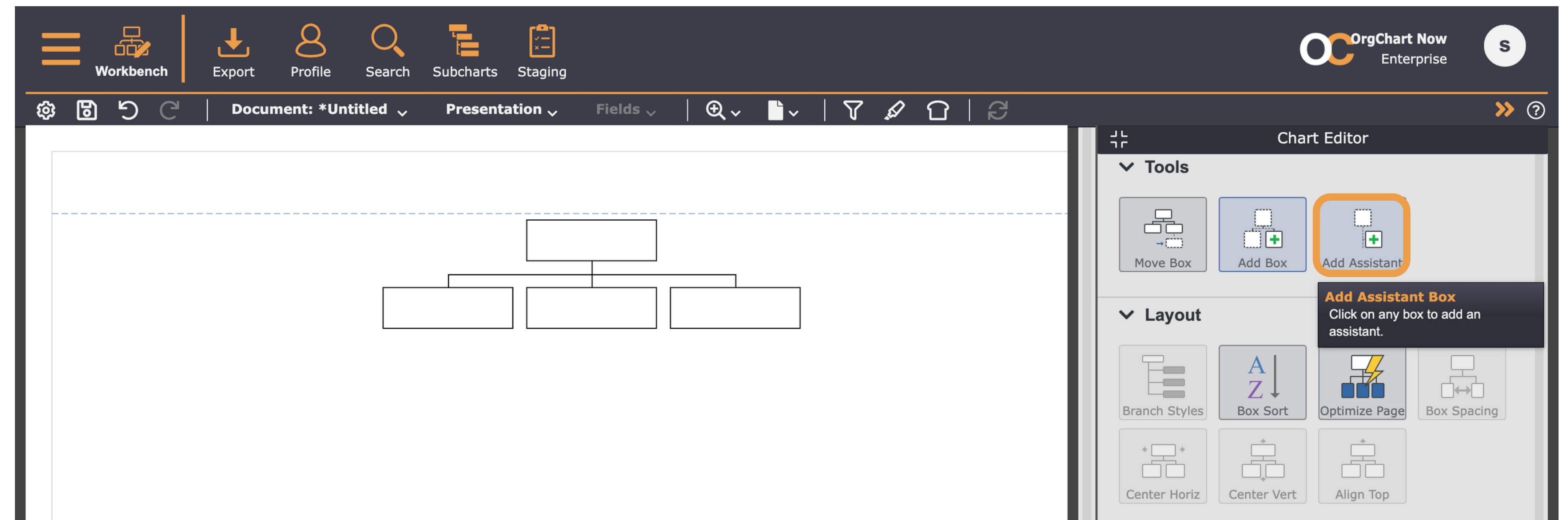
ORGCHART WORKBENCH – ADDING BOXES

TIP:

When done adding boxes, double-click anywhere outside the chart to go back to the Select icon.

2

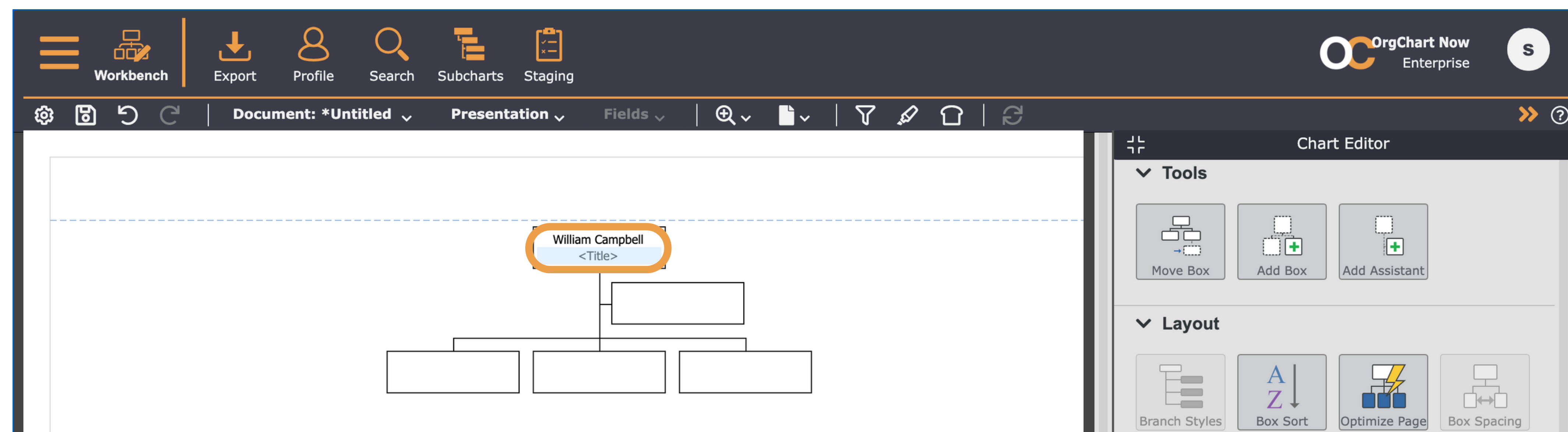
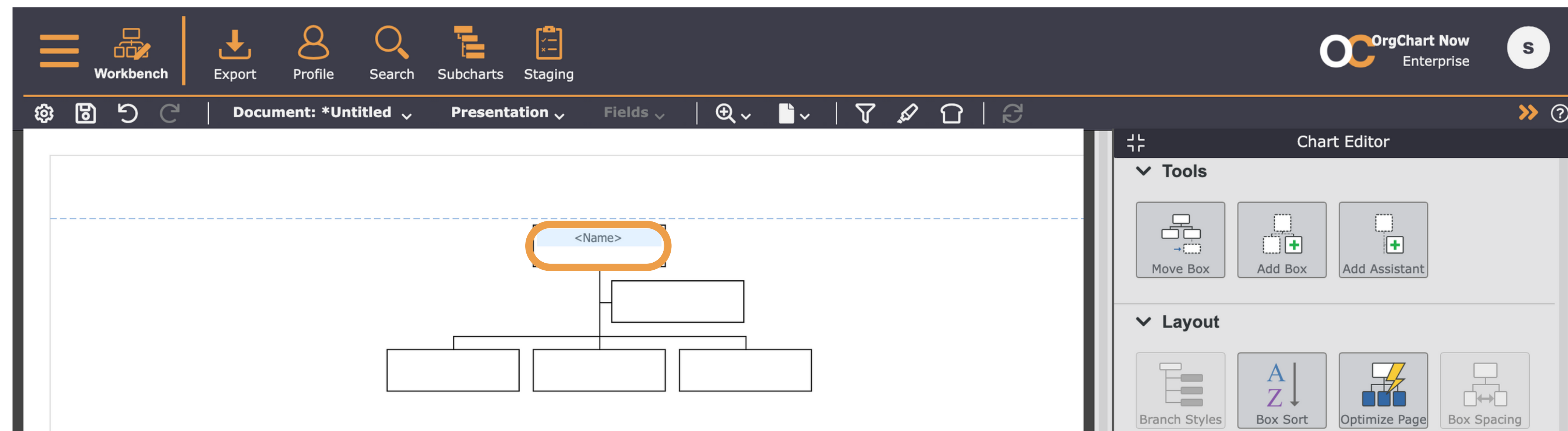
To add an assistant box, click on the Add Assistant button and click on the record requiring an assistant.



ORGCHART WORKBENCH – ADDING DATA TO THE BOXES

NOTE:

You can use the steps covered in Tutorial 2 to further create your chart, such as – Branch Styles, Moving Boxes and Deleting Boxes.



1 Double-click on the box to highlight the box fields.

2 Double-click on the highlighted field and enter the information you wish to be displayed in the box, hit the Enter key on your keyboard once completed.

ORGCHART WORKBENCH – APPLYING PRE-EXISTING VIEWS

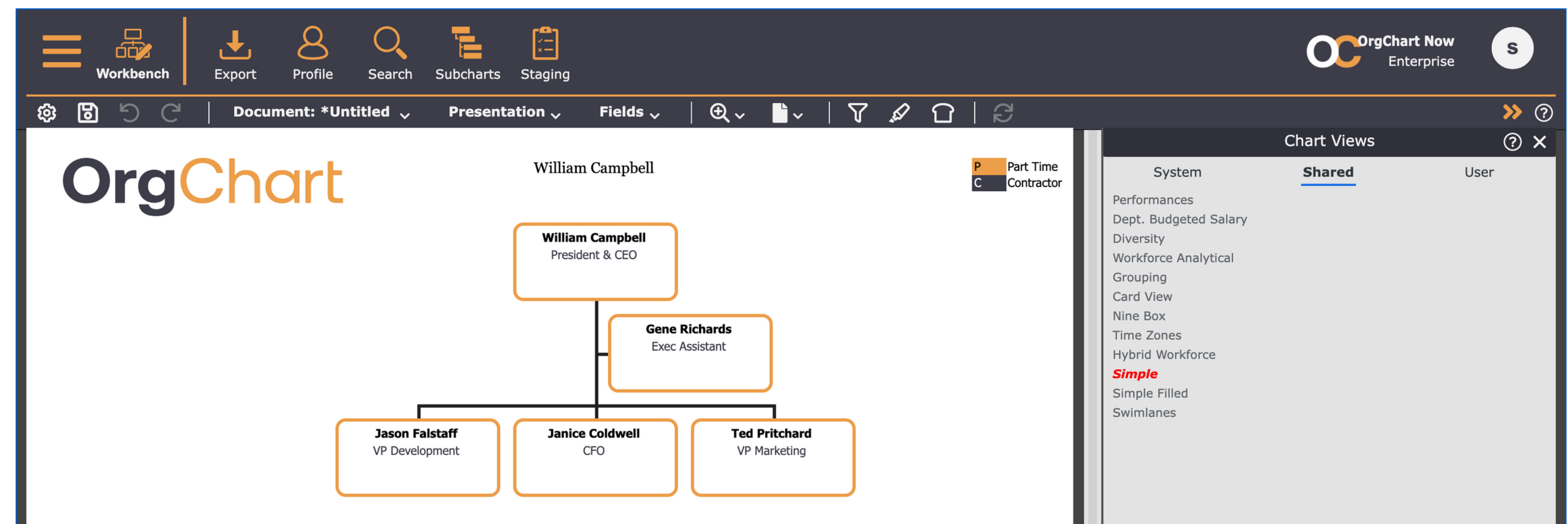
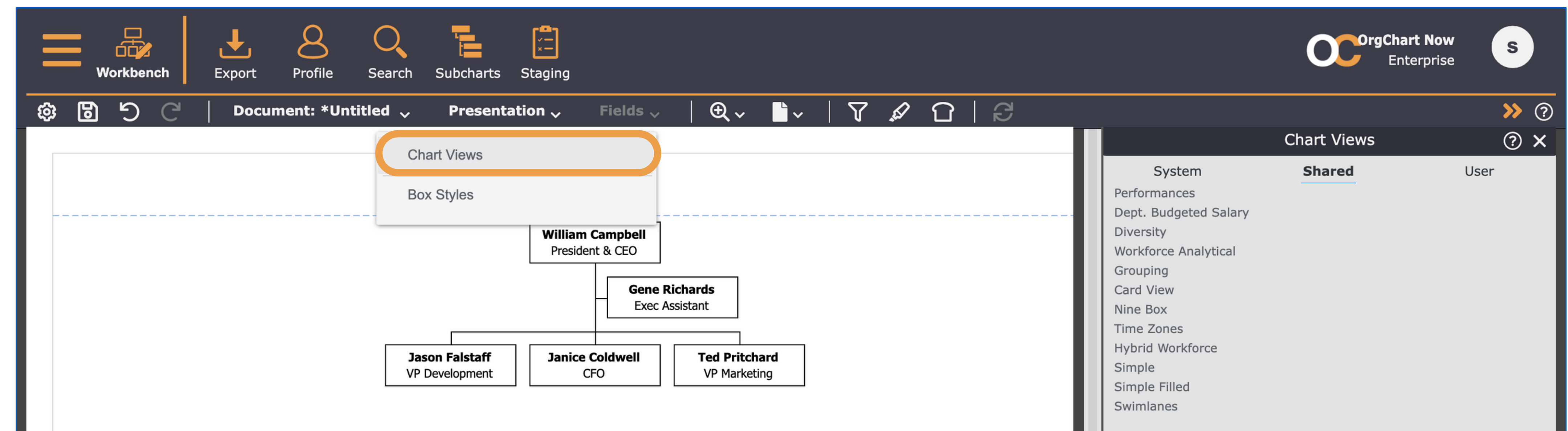
This section will walk you through applying any previously created Views to the new chart. Keep in mind that Views and Box Styles are rule-driven, if the criteria for those rules are not present in the chart, the rules will not apply or portions of the Box Styles will be empty.

1

Click on the Presentation drop-down and select Chart Views.

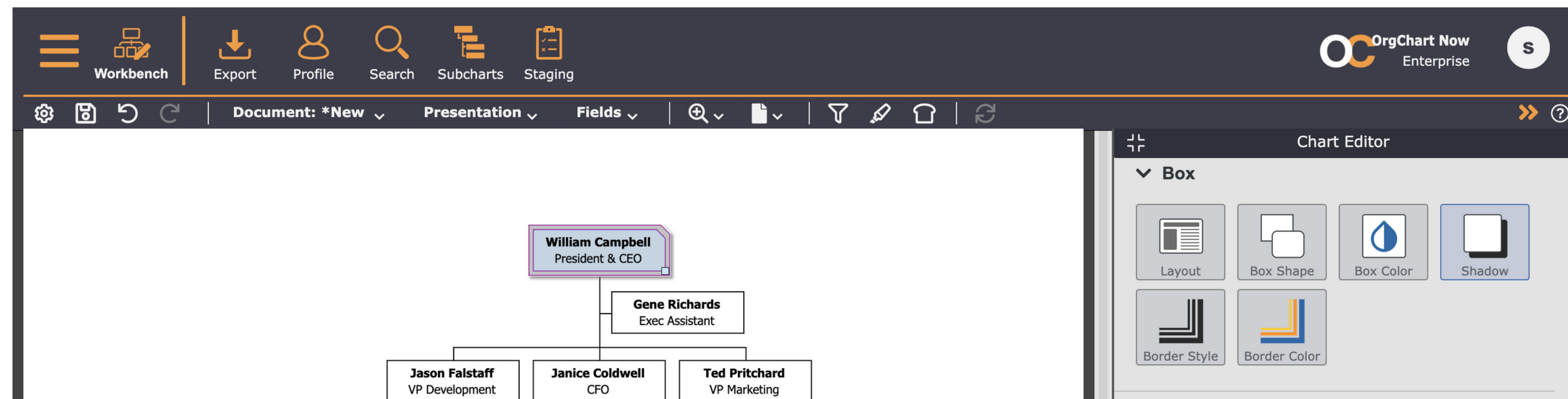
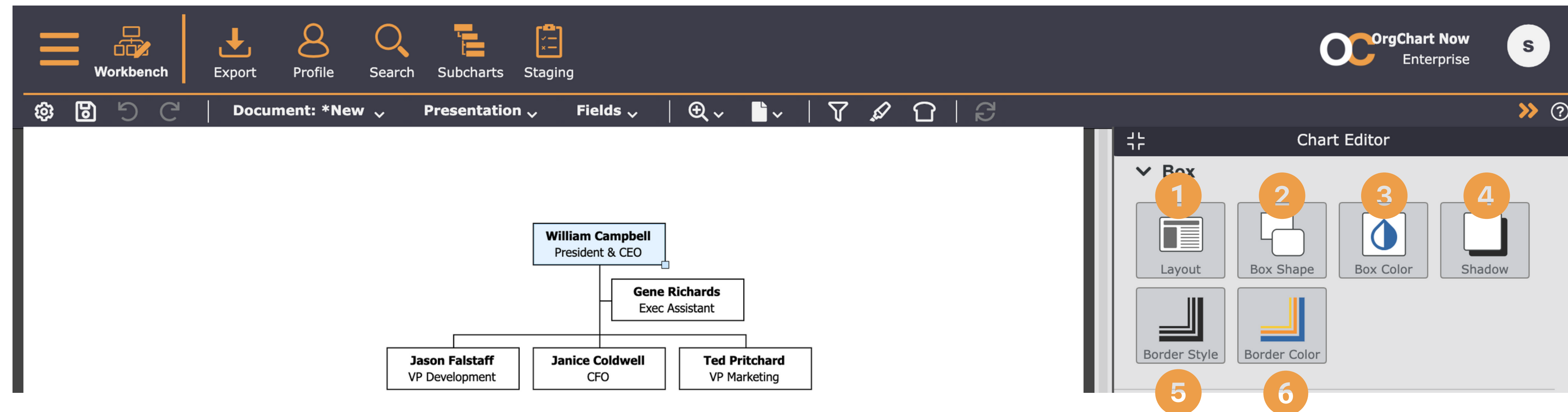
2

Double-click on the desired view in the Chart views panel to apply the view to the entire chart.



ORGCHART WORKBENCH – MANUALLY FORMATTING THE CHART

Instead of applying a pre-existing view, you can create your own Box Styles to apply to the entire chart right in the Chart Editor panel.



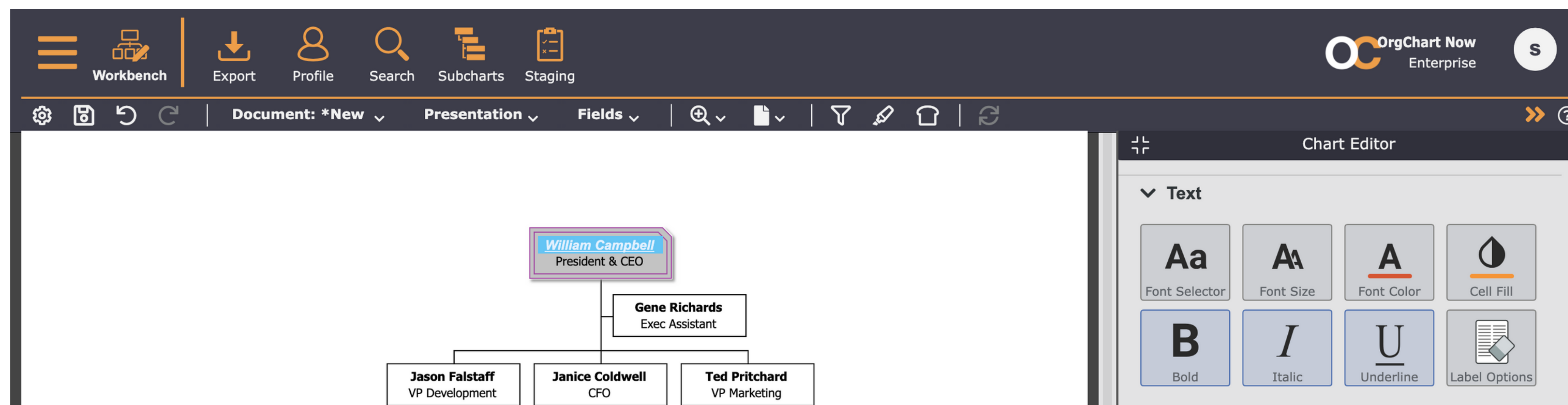
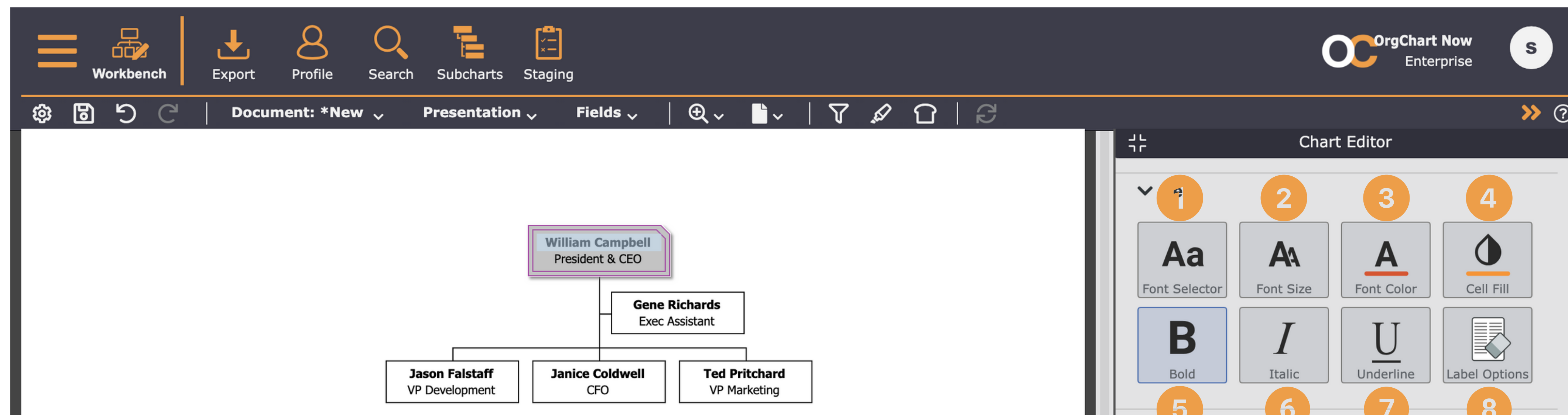
Box Editing

To begin editing your box, make sure it is selected.

- 1 Box Layout allows you to add or remove fields within the box. It also allows you to make all the below changes and edits to both the box and text.
- 2 Box Shape changes the shape of the box/box edges
- 3 Box colour - change the colour of the entire box
- 4 Shadow - add a shadow to your box
- 5 Border Style - make the border thicker, double, thinner or remove the border entirely.
- 6 Border Colour - change the colour of the border

ORGCHART WORKBENCH – MANUALLY FORMATTING THE CHART

Instead of applying a pre-existing view, you can create your own Box Styles to apply to the entire chart right in the Chart Editor panel.

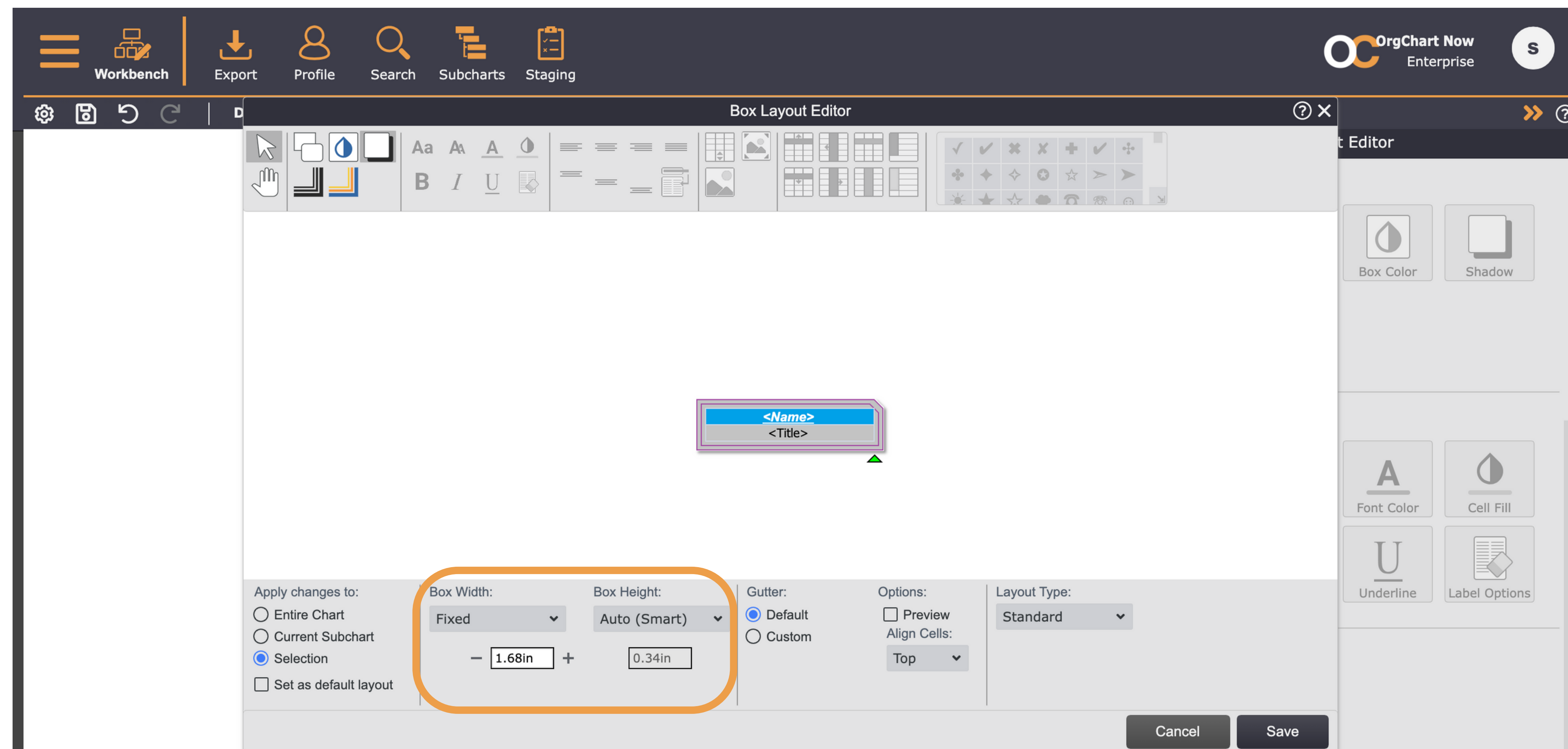


Field Formatting
To begin editing the field, make sure the field is selected.

- 1 Font selector – change the font
- 2 Font Size – change the size of the font.
- 3 Font colour – change the colour of the font.
- 4 Cell Fill – change or add colour to the text background
- 5 Bold – make the text bold
- 6 Italic – make the text italic
- 7 Underline – underline the text
- 8 Label Options – if you are using fields from a data file, you can decide whether you only want to see the Value, the Label or both.

ORGCHART WORKBENCH – MANUALLY FORMATTING THE CHART

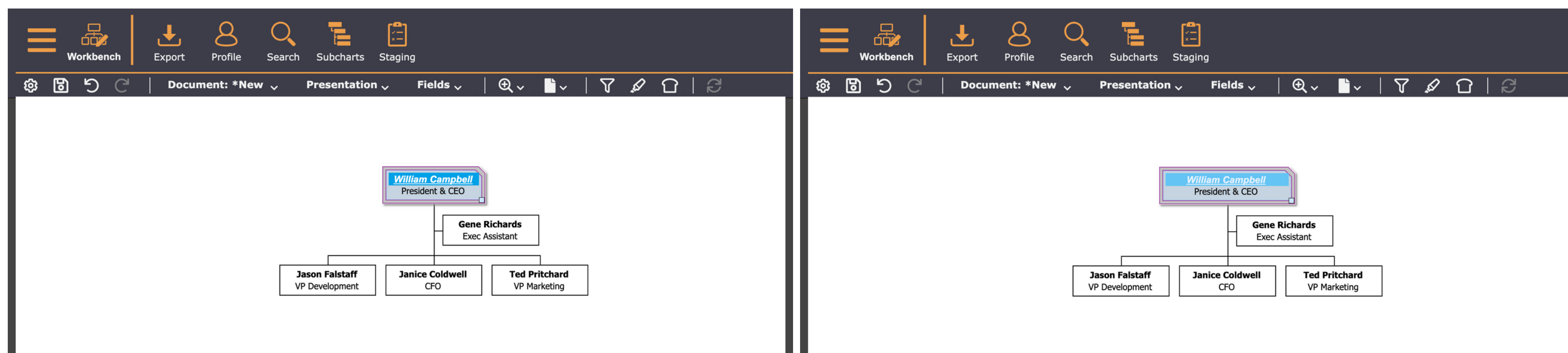
Instead of applying a pre-existing view, you can create your own Box Styles to apply to the entire chart right in the Chart Editor panel.



Box Resizing

1

You can resize the box to an exact Height and Width when using the Box Layout editor.

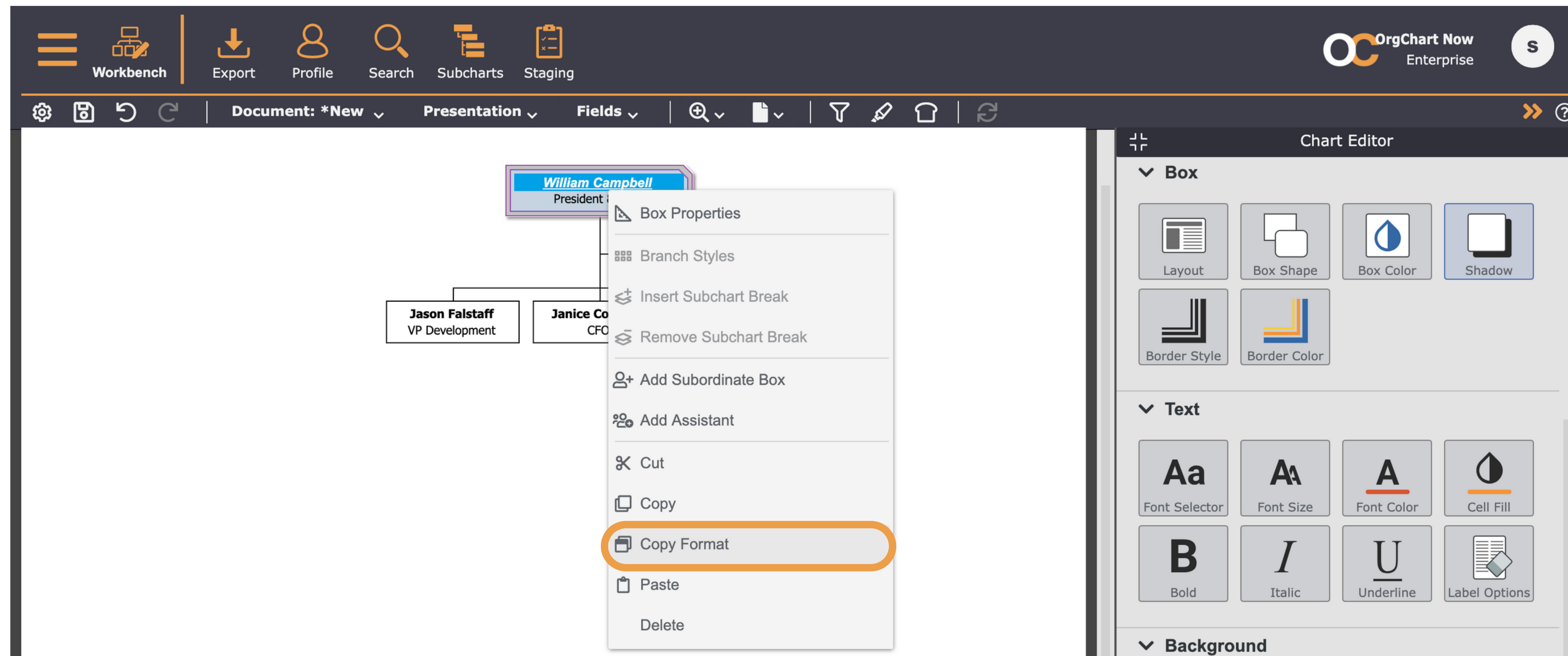


2

To change the box size on the chart, click on the box and drag the small square at the bottom-right of the box to the desired size, release your mouse to apply the new size.

ORGCHART WORKBENCH – MANUALLY FORMATTING THE CHART

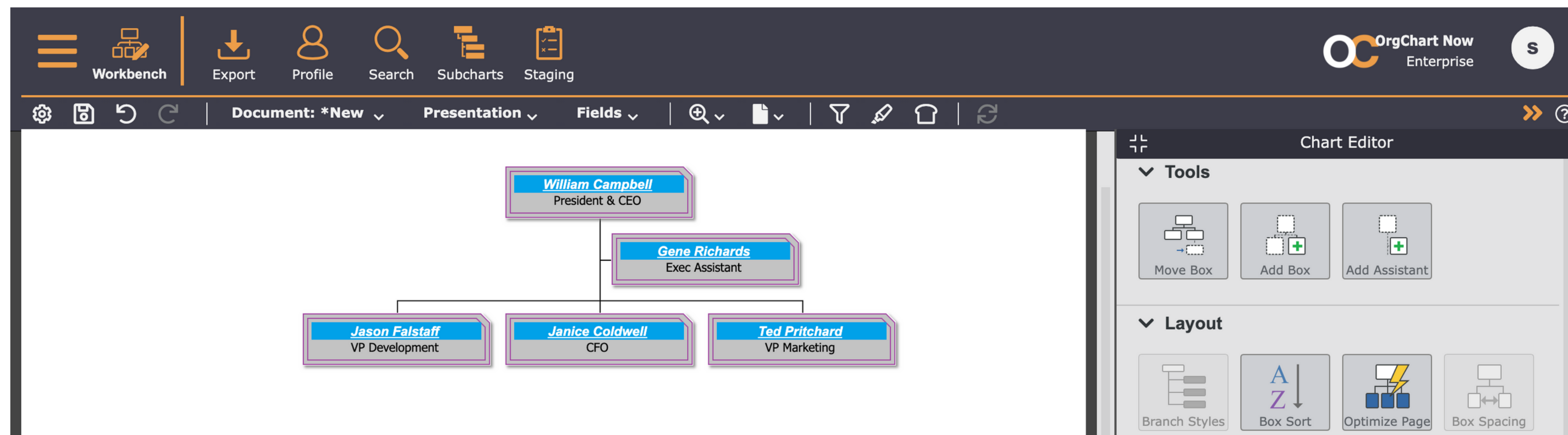
Instead of applying a pre-existing view, you can create your own Box Styles to apply to the entire chart right in the Chart Editor panel.



Applying these changes to the entire chart

1 Right-click on the formatted box and select the Copy Format option.

2 On your keyboard, click Ctrl+A and then Ctrl+V. (Ctrl+A = Select All, Ctrl+v = Paste)



ORGCHART WORKBENCH - BOX SORTING

Boxes can be sorted according to name, age, gender, etc.
For this example we will sort the boxes according to name.

1 Click on the Box Sort icon and click the checkbox next to Name.

2 Click the Apply drop-down and select the Entire Chart option.

3 Click Save.

The screenshot shows the OrgChart Now Enterprise interface. The main workspace displays an organizational chart with the following structure:

- William Campbell (President & CEO)
 - Gene Richards (Exec Assistant)
 - Jason Falstaff (VP Development)
 - Janice Coldwell (CFO)
 - Ted Pritchard (VP Marketing)

The 'Box Sort' dialog box is open on the right side of the interface. It has the following settings:

- Sort Field:** Name (checked)
- Order:** Ascending
- Apply to:** Selection
- Save** button is visible.

The screenshot shows the same OrgChart Now Enterprise interface, but the organizational chart has been sorted by name. The structure is now:

- William Campbell (President & CEO)
 - Gene Richards (Exec Assistant)
 - Janice Coldwell (CFO)
 - Jason Falstaff (VP Development)
 - Ted Pritchard (VP Marketing)

The 'Box Sort' dialog box is no longer visible, and the 'Subcharts' section is visible in the Chart Editor on the right.

CONCLUSION

END OF TUTORIAL 3

In this interactive tutorial, we covered some of the basics when it comes to creating your own chart and formatting it, these topics include – creating a blank chart, box creation, box editing, applying pre-existing Views, manually formatting the boxes and box sorting.

In the next tutorial we will learn about creating a chart with the Import Wizard.



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